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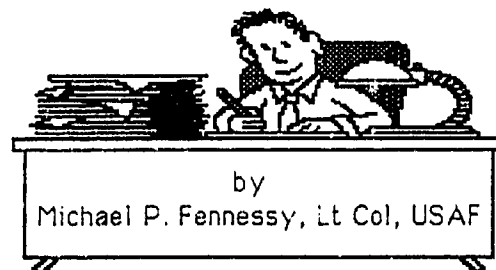
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Air War College Class of 1993

Air University

**PROJECT MATTERHORN:
A LESSON IN STRATEGY AND POLITICS**



A RESEARCH REPORT SUBMITTED TO THE FACULTY
IN
FULFILLMENT OF THE CURRICULUM
REQUIREMENT

Advisor: Dr. William Snyder

MAXWELL AIR FORCE BASE, ALABAMA

April 19, 1993

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EXECUTIVE SUMMARY

MATTERHORN is the codename for B-29 operations out of China against strategic targets in Japan and Manchuria from June 1944 to January 1945. To date, most historians have condemned MATTERHORN as a total failure that diverted critical assets for little or no immediate military gain. However, this paper shows that MATTERHORN was conducted almost exclusively for strategic and political purposes; not for operational military gains. The strategic situation in the Pacific in early 1943 was characterized by a lack of unity of command that severely impacted strategic planning and resulted in a "strategy of opportunism". Army Air Force planners were intent on using the B-29 strictly as a strategic bomber and hoped it would prove air power prophet's predictions that air power can be a decisive element of war. President Roosevelt was determined to make China one of his "four policemen" that would make his post war vision of a new international order a reality. These three factors interacted to make a militarily poor course of action appear viable -- despite the costs. MATTERHORN serves as a valuable learning tool for today's "military statesmen" to remind them of the absolute necessity for unity of command, the political nature of war, and the critical importance of logistics.

BIOGRAPHICAL SKETCH

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Project MATTERHORN: A Lesson In Strategy and Politics

The fact that the United States would one day have to conduct very long range strategic bombing attacks against Japan was considered by many a near certainty as early as the 1920s. Air power prophet BGen William "Billy" Mitchell predicted island hopping through the central Pacific to gain bases for high flying long range bombers to strike Japan. Hector Bywater wrote a fictional war novel in 1925 that predicted retaking of the Philippines and Guam to allow bombing of Japan:

... allusions were made to the gigantic fleet of aircraft which was building for the express purpose of laying waste to Tokyo and other great Japanese cities when the Americans had secured a base within striking distance.¹

Following Pearl Harbor, the overwhelming desire to "strike back" directly at Japan was felt by most Americans, especially President Roosevelt (FDR). He was a driving factor behind various schemes, including the Doolittle raid in 1942.² But the "opening round" of the strategic bombardment of Japan came not from the Pacific islands as many had expected, but from mainland China under a project called "MATTERHORN".

MATTERHORN was the codename for B-29 operations out of India-China to bomb strategic targets in Japan and Manchuria. Some have described MATTERHORN as an operational and logistics nightmare that failed to provide any apparent military gain in almost nine months of bombing. Many in the Allied coalition were opposed to the plan for numerous reasons, but primary being that it would be a tremendous logistical strain on an already overburdened theater.³ If the plan offered such little opportunity for success, then what was so important for it to go ahead?

To date, most historians have condemned MATTERHORN as a total failure that

¹ Craven, Wesley F and Cate, James L. *The Army Air Forces in World War II Vol V The Pacific: MATTERHORN to Nagasaki*, (University of Chicago Press, Chicago, IL, 1953), pg xvi.

² Spector, Ronald H., *Eagle Against the Sun*, (The Free Press, New York, 1985), pg 487-8.

³ Craven, pg 17-29.

diverted critical assets for little or no immediate military gain. The historians rely on the stated purpose of MATTERHORN -- the early and sustained bombing of Japan -- to show that it did not come close to achieving its objectives. However, three primary factors interacted to make MATTERHORN appear to be a viable operation: the strategic situation in the Pacific theater;⁴ the Army Air Force's (AAF) strategic bombing doctrine; and FDR's strategic vision for China. An analysis of these three factors will show that MATTERHORN was carried out almost exclusively for strategic and political purposes -- with the early and sustained bombing of Japan being one of a few potential side benefits. Even though, as the dominant factor, FDR's strategic vision would normally be covered first, an up front discussion of the primarily military factors will give a better strategic appreciation of the political factor. With this in mind, the paper will cover the strategic situation in the Pacific, followed by the impact of strategic bombing doctrine, and then the political factor -- FDR's strategic vision. In addition, some lessons that should be learned (or relearned) from the national and military strategic situation surrounding the MATTERHORN Project will be discussed.

----- Strategic Situation in Pacific -----

To better understand the strategic importance of MATTERHORN, it is vital to understand the "strategic backdrop" of the war in the Pacific prior to approval of the MATTERHORN project at the Sextant conference on 6 Dec. '43.⁵ First and foremost, the Pacific was secondary to the European Theater of Operations (ETO). Also, there was no single Supreme Allied Commander in the Pacific -- no unity of command at the strategic level. Second, American public opinion favored the Pacific war. Third, the perceived strategic importance of China for future operations. And finally, the Pacific theater covered vast distances.

⁴ By Pacific theater, I mean all operating areas: Pacific Ocean Area; SouthWest Pacific Area; and the China-Burma-India "theater".

⁵ A synopsis of key CCS conferences around this time is included at the end of this paper.

Being a secondary theater meant that supplies, manpower, and combat power were in short supply in the Pacific. Commanders were hard pressed to field adequate forces for planned operations and to sustain them in battle. Essentially, the Pacific war was a strategic defensive, with limited offensives as opportunities and combat power allowed. As John Skates of Air University aptly put it, the strategy in the Pacific was a "strategy of opportunism".⁶

The secondary nature of the Pacific theater had profound impacts on strategy and operations. The politicians and military staffs in Washington and London expended most of their energies on victory in Europe -- the Pacific seemed almost an after thought in the initial years of the war. Combine this with the fact that there were several "theater" commanders trying to influence theater strategy and the result was a fairly inefficient war effort. The primary players were Adm Nimitz in the Pacific Ocean Area (POA); Gen MacArthur in the Southwest Pacific Area (SWPA); Lord Mountbatten in the China-Burma-India theater (CBI); and Generalissimo Chiang Kai Shek in China. All of these individuals had extremely strong personalities and were convinced they held the answer to defeat of the Japanese.

The Combined Chiefs of Staff (CCS) were unwilling to take on the seemingly impossible task of designating a Supreme Allied Commander in the Pacific. The political and military interests of the allies were not as unified as they were in the ETO. Colonial overtones and post-war ambitions were major factors that prevented a closer allied effort. In addition, parochial interests played their part to keep the Navy and Army from subordinating one to the other. The ETO was primarily a land war, making an Army Supreme Allied Commander fairly obvious and logical. But the Pacific theater was every bit as much a naval war, perhaps more, as it was a land war. Each service had drastically different opinions on how to defeat Japan. In the end, the CCS

⁶ Skates, John Ray, "In Search of Pacific Strategy", reprinted in: *Dept of Military Studies Readings: Book 2* (MS-610, Air University, Maxwell AFB AL, 1992), pp 60-61.

simply chose not to make a decision and to let each party -- British, Chinese, Navy, Army, and even Air Force -- do its own thing.⁷

This lack of a unified command structure under a single theater commander affected strategic decision making and contributed to making a militarily poor course of action, the MATTERHORN Project, possible. Modern day joint campaign doctrine places heavy emphasis on the commander's vision and his strategic assessment of the theater. An integral part of the campaign plan is to visualize the desired end state and design a strategy for attaining it through effective and efficient use of combat power.⁸ None of the staffs in the Pacific had the authority, responsibility, or the where-with-all to conduct an exhaustive theater wide assessment and then come up with a viable strategy that focused combat power toward the ultimate end state -- the unconditional surrender of Japan. Each staff was forced to focus narrowly on their individual sub-theaters within the overall Pacific theater. Consequently, combat power was diluted and no coherent theater-wide "campaign plan" was devised until Mar '44 -- more than two years into the war!

Without a General Eisenhower to oversee the theater, key decisions were left to the politicians and staffers half a world away. There was nobody in theater that could objectively analyze the proposed MATTERHORN operation and determine if the costs and risks were worth the limited potential gains. There was nobody to offer advice and alternative courses of action that could have made better use of the B-29s, while at the same time doing something else to satisfy political requirements vis-a-vis FDR and China (more later). Instead, the several sub-theater commanders were essentially observers (each making their own pitch why they should have the B-29s) as political and military forces in Washington made vital decisions impacting the entire theater.

⁷ Skates, pg 61.

⁸ For a full discussion of Joint Campaign Planning, see AFSC Pub 2, *Service Warfighting and Synchronization of Joint Forces*, (National Defense University, August 1992) and Joint Pub 3.0, *Doctrine for Unified and Joint Operations*, January 1990.

Another factor influencing strategy in the Pacific was American public opinion. Even though the political and military leaders had agreed to a Europe first strategy -- the American people had not! The Japanese 'sneak' attack on Pearl Harbor profoundly humiliated the American psyche. The nation wanted nothing more than to immediately bring the perpetrators of this foul deed to justice. The Europe first strategy frustrated Americans who saw Japan, not Hitler, as the primary enemy. A Feb. '42 poll showed 62% of Americans favored concentrating the war effort against Japan; only 25% preferring to focus on Hitler. This opinion only sharpened throughout 1942 as America suffered numerous set-backs in the Pacific.⁹

President Roosevelt felt intense pressure to do something substantive in the Pacific. He gave numerous speeches and fire side radio chats trying to talk up what was being done in the Pacific. But what he needed were substantive gains, even if only symbolic in nature, to appease the nation. The Doolittle raid was carried out specifically for this purpose.¹⁰ Public opinion and FDR's personal frustration with events in the Pacific (exacerbated by the lack of unity of command) led to a more active role by the President in Pacific strategy formulation -- especially in China.

One thing that all Americans initially agreed on, however, was the importance of China to future operations against Japan. Both Gen MacArthur and Adm Nimitz, seeing China as a key to any invasion of Japan proper, aimed their Pacific operations toward Formosa and the east coast of China. In Dec. '42, Adm King (Chief of Naval Operations) pushed hard for operations in Burma to reopen a land line to China because he felt China was vital to future operations.¹¹ Adm King and Gen Arnold (Chief of AAF) expressed hopes that a submarine blockade and strategic bombing

⁹ Dalleck, Robert, *Franklin D. Roosevelt and American Foreign Policy, 1932-1945*, (Oxford University Press, New York, 1973), pp 332-4.

¹⁰ Dalleck, pg 334

¹¹ Hayes, Grace Person, *The History of the Joint Chiefs of Staff in World War II, The War Against Japan*, (Naval Institute Press, Annapolis, 1982), pg 260.

would make an invasion of Japan unnecessary (a powerful motivator to get bombers into the theater as soon as possible).¹²

The British were not as convinced about the importance of China, but they understood China was basically an American show and generally supported American efforts there. So at Trident in May '43, the CCS decided to "concentrate on a China initiative and to plan for the capture of Hong Kong and occupation of eastern China to provide a base to cut Japanese communications and bomb mainland Japan."¹³ In Aug '43, a Combined Planning Staff document outlined three reasons China was important: it tied up 20% of the Japanese forces; it was needed for the ultimate defeat of the Japanese; and its importance as a member of a future United Nations organization (more on this later). The document shows that the CCS considered China the focal point in any plan for the defeat of Japan -- "We should therefore base our plans on the use of China...".¹⁴ But even so, with the Pacific as a secondary theater, initial plans being considered in Aug '43 looked to 1946 before bombers could be released from the ETO to the Pacific -- an unacceptable timeline for America and FDR.¹⁵

The final major point to remember about the Pacific is that it was a theater covering vast distances. These distances stretched logistics operations almost to the breaking point and demanded extravagant resupply efforts. Distance also became a primary factor in strategic operations -- specifically strategic bombing -- as the President and his advisors looked for ways to take the fight to the Japanese home islands.¹⁶

¹² Larrabee, Eric, *Commander in Chief, Franklin Delano Roosevelt, His Lieutenants, and Their War*, (Harper & Row, New York, 1987) pp 202, 543.

¹³ Overy, R.J., *The Air War 1939-45*, (Scarborough Publishers, Chelsea MI, 1980) pg 97.

¹⁴ CPS 83, Combined Planning Staff Memo, 8 Aug 1943, pp 14-29.

¹⁵ Craven pg 16.

¹⁶ Overy, pg 97; Spector, pg 488.

----- **Strategic Bombing Doctrine Plays It's Part** -----

For the former [MATTERHORN] a system of supply, feasible if uneconomical, had been worked out...from the point of view of strategic bombardment -- and essentially that is the point of view of the AAF -- all that had passed was prologue. A new air story began on 15 June [1944].¹⁷

The doctrine of strategic bombing is based on the assumption that destroying the enemy's vital economic and military centers will have a significant impact on his ability to wage war -- perhaps a decisive impact. The vast majority of Japan's vital industrial base was split between the home islands and Manchuria. This meant that if the AAF was to carry out strategic bombardment, it would have to strike either Japan or Manchuria; not in the Dutch East Indies, Burma, or China. So almost from the outset of the war, the AAF investigated numerous ways to conduct a sustained strategic bombing campaign against Japan itself.¹⁸ The problem continued to boil down to lack of bombers with sufficient range and lack of bases from which to strike.

Resolution of the first problem came through a top secret program that resulted in the Boeing B-29. Started in 1939, the primary purpose of the program was to produce a heavy bomber capable of "superrange".¹⁹ The program was so important to the AAF that production of the B-29 was authorized before it had ever flown. This forced the bomber into production before thorough testing, and would come back to haunt the AAF during MATTERHORN. By Summer '43, it became apparent the B-29 would be ready for operations by Spring '44. Since this would be too late to assist with Overlord, planners naturally looked to the Pacific where the bomber's range

¹⁷ *History of the Twentieth Air Force: Genesis*, (Air Force Historical Office, HQ AAF, Oct 45), pg 3.

¹⁸ Gen H.H. Arnold, in his book *Global Mission*, gave the following comment: "As early as 1941... It had also been evident that in order to use it [the B-29] against Japan, we must first operate from bases either in the Marianas or in China ... we figured Japan would be free from aerial bombardment until we could get the B-29s into the picture. With this in mind our Plans Division had drawn up possible methods of operation against Japan. Naturally, the idea that first came to mind was to operate out of China." This is important to understand because it meant Gen Arnold simply would not entertain plans that did not use the B-29 strictly in strategic bombing against the Japanese home islands.

¹⁹ Haugland, Vern, *The AAF Against Japan*, (Harper & Bros, New York, 1948), pg 416.

would provide options for early use against Japan.

The next logical step for AAF planners was to see where possible bases could be developed for the B-29 strikes against Japan. Using the predicted operational radius with various bombloads, planners looked for potential bases within a 1600 mile radius of Japan (see map on opposite page).

Using Russia and/or the Aleutians was considered. In fact, FDR sent a message to Stalin in Jan. '42 requesting permission to use Russian bases and to send a base survey team to look at potential airfields. Stalin apparently never answered and the matter was dropped as being impractical until Russia entered the war against Japan.²⁰ The Aleutians were dropped primarily due to constant poor weather. In the Pacific, the first islands US forces would be able to take for B-29 operations were the Marianas. Coalition plans in the summer of 1943 did not envision being able to get to the Marianas until sometime in 1945 -- not soon enough to satisfy the AAF or President Roosevelt. So a driving factor of where the B-29 would initially be based became range -- and the only feasible territory in allied hands within range of Japan was in China. Thus, the AAF began working various schemes for China operations under the generic title "Early Sustained Bombardment of Japan".²¹

Unfortunately, the fact that it was within B-29 range was about the only thing China had going for it. China, strategically part of the CBI theater under Lord Mountbatten, was at the very end of an almost 16,000 mile logistics line.²² To make matters worse, the only tie to China was by air transport over the "hump" from India. The Japanese controlled almost 400 miles of the territory over which the transports had to fly. The "hump" was also very dangerous mountainous terrain with ever

²⁰ JCS Memo 180, "Bradley Mission", Dec 27, 1942.

²¹ Kirby, S. Woodburn MGen(ret), *History of the Second World War Vol III The Decisive Battles*, (Her Majesty's Stationary Office, London, 1962) pg 395; Craven, pg 22.

²² Haugland, pg 420.

changing weather patterns -- a hazardous flying environment even without the Japanese fighters that patrolled the area.²³ One of the primary operations in the CBI was allied efforts to open a land line between India and China. This road, the Ledo Road, was not completed until almost the end of the war.

Trickling over the "hump" from India were all the logistics and lend-lease material for Chiang Kai-Shek's armies and air forces (commanded by Gen Stilwell and Gen Claire Chennault respectively). In 1943 when MATTERHORN was being planned, the "hump" was totally incapable of supplying China's needs, let alone several hundred fuel and bomb hungry B-29s. Any plan to put bombers into China would have to include a massive infusion of transport aircraft to even hope to handle the load.

Another major problem with China (as with anywhere in the Pacific) was lack of airfields capable of handling the B-29. Because of the operating weight of the B-29, runways had to be almost twice as thick as normal and at least 8,000 feet long.²⁴ AAF planners initially rejected the project in early 1943 because they recognized it was logistically not supportable and would involve a severe drain on CBI theater assets. Their initial instinct would prove to be right. But the AAF desire to conduct a concentrated strategic bombing campaign against Japan was very strong.

Despite these problems, America continued to favor using China as a base to bomb Japan. FDR and military planners had considered using China since before the war. At Arcadia in Dec. '41, FDR and Churchill discussed it. At Casablanca in Jan. '43, it was FDR who suggested the idea of basing 2-300 B-29s in China to bomb Japanese shipping and perhaps Japan proper. Also at Casablanca, an "air mentality" for China was agreed to by all.²⁵ The President stressed the desirability of

²³ Craven, pg 91.

²⁴ Craven, pg 58-71.

²⁵ Craven, pg 14.

hitting shipping again at Trident in May '43. He was convinced air could be built up in China to strike Japan herself. FDR also reminded everyone they "must bear in mind the political fact that China is in danger of collapse."²⁶ By the time of Quadrant in Aug '43, all had agreed in principle to use China for B-29 bases as part of a two-pronged strategic attack that some hoped may nullify the need for an assault on Japan. The two prongs were a total submarine blockade of Japanese shipping and a strategic bombing campaign against Japan proper. Initial AAF plans were fine-tuned until the Fall '43. By this time, the proposals boiled down to a stand-off between BGen Wolfe's 27 MATTERHORN plan and Gen Chennault's TWILIGHT plan.

Both plans called for stationing two wings (58th and 73rd) of B-29s (125 in each wing) under the XXth Bomber Command (BC) at four airfields in India as a base of operations. Transport aircraft and the B-29s themselves would then carry all supplies (including bombs and fuel) forward to four more bases in China. Both plans also called for the XXth BC to be self-sufficient in order to have minimal impact on "hump" operations; so additional squadrons of C-46s, C-87s, and C-109s were eventually assigned to the command. It was envisioned the B-29s would fly one "tactical" mission against Japan from the China bases for every five "transport" missions they flew over the "hump". From this, simple math dictated a maximum of 4-5 bombing raids per month -- not many, considering the amount of effort expended.²⁸

The primary difference between the two plans was the location of the China bases (see map opposite). TWILIGHT called for bases in East China near Gen Chennault's 14th AF bases in the Kweilin area. MATTERHORN relied instead on

²⁶ Hayes, pg 387.

²⁷ BGen Wolfe was the commander of the new XXth Bomber Command in Salina Kansas and, as such, was responsible for bringing the B-29 and the XXth BC to operational status. BGen Wolfe was also the first commander of MATTERHORN in China-India until he was removed by Gen. Arnold for not producing results quick enough.

²⁸ Craven, pp 18-29.

bases 400 miles west near Chengtu. Planners eventually went with MATTERHORN because of security concerns in eastern China (proximity of Japanese troops and airfields).²⁹ This was a fortuitous decision since Chennault's eastern bases were under constant attack from Spring '44 and were eventually overrun by the Japanese in Spring '45.

General Arnold endorsed Wolfe's MATTERHORN plan on 13 Oct. '43 -- "I have told the President that this will be started (in China to Japan) on March 1. See that it is done. HHA."³⁰ Gen Arnold then informally briefed the President on the plan. The limiting factors were airfield construction, transporting adequate logistics, and the fact that the Air Force had yet to take possession of a single B-29! President Roosevelt wholeheartedly supported the concept, but was furious that it would take so long to get into operation. He demonstrated his growing impatience in a letter to Gen Marshall immediately after Gen Arnold's briefing:

I am still pretty thoroughly disgusted with China-India matter. The last straw was the report from Gen Arnold that he could not get the B-29s operating out of China until March or April of next year.³¹

In any case, FDR approved the concept in principle and cabled Prime Minister Churchill and Generalissimo Chiang Kai-Shek on 10 Nov. '43 to elicit support. Basically, this took the decision out of military hands and the plan "sailed" through the CCS, despite resistance within the JCS and CCS, at the Sextant Conference (Cairo, Nov.-Dec. '43). In fact, the Joint Planning Staff apparently recommended MATTERHORN only because of the priority the JCS and FDR had put on it -- against their better judgment. The Joint Intelligence Committee actually shifted target priorities to put coal ahead of POL (petroleum, oil, and

²⁹ Craven, pp 18-29.

³⁰ History, pg 66.

³¹ Larrabee, pg 609.

lubricants) to justify MATTERHORN.³²

President Roosevelt's intense and unwavering desire to strike back at Japan was only one of the reasons he pressed for MATTERHORN. As alluded to earlier, the President also felt a great need to keep Chiang Kai-Shek in the war and to set the stage for postwar diplomacy.

--- *FDR and the China Factor* ---

"[FDR's] vision of the future was his driving life force..."

Arthur M. Schlesinger ³³

Lack of unity of command in the Pacific, a strong desire to strike back at the Japanese home islands, or the AAF's strategic bombing doctrine do not provide adequate reasons for the Allies to sanction an operation that offered so little payback as MATTERHORN. There had to be something else that led the Allies to believe the immense undertaking was worth the effort. That something else -- and the overriding reason MATTERHORN was launched -- was the perceived need to keep China in the war and help FDR set the stage for his vision of the postwar balance of power in the region. As stated before, MATTERHORN reflected political objectives that extended beyond the defeat of Japan.

President Roosevelt and the China factor are without a doubt the biggest single reason military planners went ahead with the MATTERHORN Project. Indeed, FDR's feelings and hopes for a post-war China were decisive in shaping America's Pacific strategy. These feelings were shaped by his personal experiences, his advisors, and a strong public attachment to China.

President Roosevelt had a personal affinity for China. His grandfather, Warren Delano, had been active in China and had discussed it with FDR. In fact, FDR was

³² Craven, pp 23, 28-9.

³³ Graham, Otis L. Jr and Wonder, Meghan Robinson (Editors), *Franklin D. Roosevelt, His Life and Times*, (G.R. Hall & Co, Boston, 1985), pg 34.

often quick to point out his family's almost one hundred years of association with China.³⁴ With what he considered a strong background, FDR considered himself somewhat of an expert on China.³⁵

Numerous other individuals impacted his early thoughts on the Far East. In 1902, a Japanese friend at Harvard told FDR how Japan had a one hundred year plan for expansion to be the father of all the yellow races -- to control all the Pacific. When FDR was Assistant Secretary of the Navy for President Wilson, he learned a great deal more about China and Japan. Wilson shared with FDR his belief that Japan was the "Prussia of the Far East" and could not be allowed to gain control over China. This "Yellow Peril" mentality permeated the administration in 1913 and led FDR to draw up war plans against Japan. Of significance, Wilson had close ties to the missionary movement and felt "keenly the desire to help China."³⁶ Wilson's work toward the League of Nations based on a concept of free trade also heavily influenced FDR. This influence would play a large role in FDR's post war vision.³⁷

Another big influence on FDR's Far East policies was his advisors. Most of his closest advisors were very much pro-China and shared FDR's basic distrust of Japan. Perhaps the most powerful advisor, with the most access to the President, was Harry Hopkins. Hopkins had been assigned to China early in his career with the State Department and was extremely pro-China. Hopkins also was obsessed with the need to bomb Japan as soon as possible. On 14 Mar. '42, in a meeting with FDR, Hopkins said:

[The second phase] of this China business is to get a springboard from

³⁴ Roosevelt, Franklin D., *Franklin D. Roosevelt and Foreign Affairs, Vol III*, ed. Edgar B. Nixon, (Belknap Press, Cambridge, 1969), pp 305-6.

³⁵ Kinsella, William E. Jr, *Leadership in Isolation: FDR and the Origins of the Second World War*, (G.K. Hall & Co, Boston, 1978), pp 49, 80.

³⁶ Marks, 44-5.

³⁷ Utley, Jonathan G., *Going to War With Japan 1937-1941*, (University of Tennessee Press, Knoxville, 1985), pp 68-9.

which to bomb Japan itself. For morale reasons this is extremely important and the sooner it can be done the better.³⁸

It is unclear whose morale Hopkins was referring to, but it most likely was for American morale based on the mood of the nation at the time. But this vocal 'bomb Japan' and support China mentality of his closest advisor must have influenced FDR.

It is significant to note that the Chinese Foreign Minister, T.V. Soong, was a very close friend of Hopkins. With this friendship, T.V. Soong had easy access directly to FDR.³⁹ It is also interesting to note that T.V. Soong was Madame Chiang Kai Shek's brother. So the Chiang government was very well connected with the FDR administration. An example – on 9 Feb. '42, T.V. Soong met with FDR and suggested the establishment of an airlift from India to China over the "hump". FDR approved the concept and immediately directed initiation of the resupply effort.⁴⁰

Another close advisor to FDR was Henry Morgenthau, the Secretary of Treasury. Morgenthau was also initially very pro-China. In the years prior to the war, Morgenthau was vocal in his support of China and the need for the US to provide China assistance against the Japanese invasion.

A final advisor who needs to be noted is Stanley Hornbeck, Chief of the Far East Division at the State Department. The son of a Methodist minister, Hornbeck spent five years teaching in China. He resigned his position at State in 1937 to become a close personal advisor to FDR. Hornbeck was staunchly pro-China and was also a close friend of Hopkins. He has been described as "an implacable enemy of Japan, defender of China".⁴¹

Americans had felt a special place in their hearts for China since the late

³⁸ Sherwood, Robert E., *Roosevelt & Hopkins, An Intimate History*, (Harper & Bro, New York, 1948), pg 518.

³⁹ Kinsella, pg 211.

⁴⁰ Dalleck, pg 331. Marks pg 513.

⁴¹ Utley, pg 8.

nineteenth century. People old enough to recall church and radio programs from the thirties remember constantly hearing about China and the need for donations and help for this vast country striving for democracy. Missionaries and religious organizations were instrumental in burning China into the minds of almost all Americans:

For twenty-five years after the Revolution of 1911, Americans held considerable sway over certain sectors of Chinese life. From every pulpit came the message that China aspired to democracy and a knowledge of a Christian God.⁴²

There were numerous American missionaries in China running churches, hospitals and schools. These missionaries were also very well connected to the American media and administration. Couple this with several influential entrepreneurs like Rockefeller, organizations like the YMCA and Ivy League, and the result was a very powerful 'China lobby'. This lobby sold America on the limitless potential of China and the need to remain actively engaged there.⁴³

The British fully recognized American sentiment toward China and even felt that in some respects China would be a preferred ally over Great Britain. A May '42 British Foreign Office report is indicative: "But even on that score we lag behind China."⁴⁴ America's -- and FDR's -- fixation with China became readily apparent to Churchill at the first CCS meeting (Arcadia Conference) in Dec. '41. Churchill "found the extraordinary significance of China in American minds, even at the top, strangely out of proportion" and told FDR he overestimated Chinese potential. FDR "differed strongly" and brought up China's vast population and post war potential. Churchill said he had a one word lesson at Arcadia and "it was China".⁴⁵ As a result, throughout the war the British basically acquiesced to American desires with China -- China became almost

⁴² Marks, Frederick W. III, *Wind Over Sand, The Diplomacy of Franklin Roosevelt*, (The University of Georgia Press, Athens GA, 1988), pg 47.

⁴³ Marks, 45-48.

⁴⁴ Dalleck, pg 592.

⁴⁵ Dalleck, pp 328-9.

exclusively an American show. So, Britain's valuable advice in the Far East consistently fell on deaf ears.

Clearly, the JCS recognized that it was a "firm national policy to render support to China". As such, it became a fundamental part of all military planning.

The President was insistent, and in order to understand subsequent developments it is important to remember this basic attitude, that China should be treated as a Great Power, as nearly as possible on a par with the United States and Great Britain.⁴⁶

The President shared the long standing American sentimental attachment to China and understood the extraordinary grip it had on American opinion. "She [China] was the favorite ally... [and] above all was seen as America's natural democratic ally."⁴⁷

Taking the synergistic effects of FDR's vision, public sentiment, the pro-China advisors, and military planners convinced that China was essential to the war effort, and it is easy to understand the policies FDR pursued in the Far East. Basically, everyone responsible for policy or military strategy supported efforts that would keep China in the war and bolster flagging Chinese morale. Admittedly, each constituency had their own reasons -- the military to have a base of operations to bomb and assault Japan; FDR to support military operations and set the stage for his post war vision. But the end result was the same -- China was a (the?) top priority in Pacific strategy.

So just what was FDR's vision that, as Arthur Schlesinger said, "was his driving life force"? FDR believed strongly in "big power domination", and this was the central theme in his approach to international order and his concept of a future United Nations organization. He was intent on establishing a new world order (sound familiar?) maintained initially by four "policemen": the United States; Great Britain; the Soviet Union; and China. The policemen were to be "so powerful that no aggressor would challenge it". In 1942 FDR stated that "violators would first be quarantined and

⁴⁶ Hayes, pg 72. Quote is taken from minutes of a JCS meeting.

⁴⁷ Dalleck, pg 328.

then...bombed at the rate of a city a day until they agreed to behave."⁴⁸ From this vision two key points need to be emphasized. First, FDR liked strategic bombing. Second, he was envisioning an actively engaged American foreign policy -- a very different approach from the normal isolationism. Anthony Eden of Britain was convinced that FDR was playing off America's love affair with China to help America accept the world leadership role FDR wanted to craft for her.⁴⁹

President Roosevelt saw a strong and democratic China as the dominant power in the Pacific. As such, FDR wanted China to act as a counter to any resurgent Japan and to possible Soviet expansion in the region. In addition, he hoped a democratic China would inspire colonies to seek independence and put an end to colonial rule throughout the Pacific. President Roosevelt was determined that none of the colonial powers would reacquire their former colonies in the aftermath of the war. He needed China to help -- especially to offset Great Britain.⁵⁰

With this vision of the important role China was to play, it is clear why FDR did all he could to support China. China was seen as a critical linchpin in the defeat of Japan. Moreover, FDR's life ambition was inextricably linked to the fate of China -- and to the success of Chiang Kai-Shek.

The problem was that Chiang Kai-Shek knew this and kept threatening to bow out of the war if not given what he wanted. In his defense, he did have ample reason -- the allied powers had been professing China's importance since the war began and had promised considerable support. But by the summer of 1943, very little tangible support had arrived. The Allies continually backed out of their promises. As FDR stated in Oct. '43: "Everything seems to go wrong. But the worst thing is that we are

⁴⁸ Graham, pp15+.

⁴⁹ Dalleck, pg 391.

⁵⁰ Simpson, Michael, *Franklin D. Roosevelt*, (Basil Blackwell, Ltd, Oxford, 1989), pp 62-3.

falling down on our promises every single time. We have not fulfilled one of them."⁵¹

Chiang's patience was running out when Gen Arnold visited China following the Casablanca Conference in Jan. '43. Chiang told Gen Arnold to inform FDR if he didn't see increased "hump" tonnage and other "convincing" support by Nov. '43, he was out.⁵² This threat scared the daylights out of American planners, as well as FDR. Remember, the military was counting on the use of China in the eventual defeat of Japan and FDR had high hopes for post war diplomacy. Remember, he wanted "a strong China as the dominant and stabilizing power in east Asia..."⁵³ Because of this, the Americans were determined to give China a visible sign of Allied commitment. This sign would come in increased "hump" tonnage and the stationing of America's newest and best bomber on Chinese soil -- regardless of the impacts this may have.⁵⁴

----- MATTERHORN in Operation -----

So just what impacts did MATTERHORN have? A quick synopsis of what happened will answer this question. To begin with, five airfields were constructed in India at a cost of \$15,000,000. These airfields were basically completed by Mar. '44, but only after Lord Mountbatten had to divert a large number of Ledo Road engineers to the projects.⁵⁵ Eight airfields (4 for fighters) were built by hand near Chengtu by over 375,000 Chinese laborers between Jan. and Apr. '44 -- a phenomenal feat by any stretch of the imagination. Total cost of the Chinese airfields was a staggering \$150,000,000. In addition, one airfield was built on Ceylon for use against the Dutch East Indies oil facilities. All totaled, 14 airfields in six months at a cost of almost

⁵¹ Dalleck, pg 425.

⁵² Arnold, H.H. (Gen), *Global Mission*, (Harper & Brothers, New York, 1949) pp 421-6.

⁵³ Bradley, pg 216.

⁵⁴ Spector, pg 489. This promise not only meant stationing the B-29 in China, but it also resulted in the diversion of an immense portion of allied transport aircraft to the CBI. This diversion of transports infuriated Gen Marshall because he felt it had a significant impact on the ETO. Few transports were available when they were drastically needed for Overlord and operations in Italy.

⁵⁵ An important note is that the CCS had insisted MATTERHORN not impact CBI operations.

\$200,000,000. ⁵⁶

By Mar. '44, the 58th wing B-29s had arrived in India and were flying transport operations over the "hump" to their forward fields in the Chengtu area.⁵⁷ The B-29s experienced severe operational problems from the outset. First, the fact that the bomber was forced into production without much flight testing resulted in the "debugging" process being done in the field. Over 3,000 engineering changes were made during the first months in India.⁵⁸ Engine problems actually resulted in more combat losses than to enemy action. Second, the crews had almost no training, especially with the complicated radar and gunnery system. The fact that crews spent most of their time flying stripped down B-29 "transports" over the "hump" didn't help either. The initial ratio was almost 8 transport missions to one combat mission. This later improved to about 4 to 1. This lack of "tactical" proficiency resulted in gross bombing results on combat missions. But another factor that added to this was weather. The weather over Japan was almost always bad and normally forced crews to radar bomb; which they weren't trained to do!⁵⁹

Essentially, the B-29 operated out of China between Jun. '44 and Jan. '45 when they were pulled back to India and used in tactical operations there until they moved to the Marianas in Mar. '45.⁶⁰ In these nine months, a total of 49 raids were flown. Only nine strategic missions were against Japan proper; none resulted in any significant damage to Japanese industry. A few raids were flown against the coke plants in Manchuria, the only successful strategic strikes, resulting in a 65% reduction in output

⁵⁶ Craven, pp 58-70.

⁵⁷ In Mar. '44, the CCS agreed to step up landings on the Marianas to Jun. '44. This resulted in the diversion of the 73rd wing from MATTERHORN to the Marianas. This would prove a crippling blow to MATTERHORN because it dramatically reduced available transports and also essentially reduced the strategic emphasis on China and B-29 operations from there.

⁵⁸ LeMay, Curtis E., Gen and Bill Yenna, *Superfortress*, (McGraw-Hill Book Co, New York, 1988) pp 78-9.

⁵⁹ Craven, pp 94-7.

⁶⁰ Craven, pg xiv.

for six months. Much to Gen Arnold's dismay, besides mining Haiphong harbor, all other missions from China were tactical in support of POA operations (there were also 244 reconnaissance missions flown) -- not in line with strategic bombing doctrine.⁶¹

Logistically, MATTERHORN operations proved to be a tremendous drain on the XXth BC crews and the entire war effort. Transport aircraft were diverted from the ETO at a critical time. One problem was that planners had been overly optimistic in how much the B-29 and C-46/C-87 could carry over the "hump". Twice as many missions were required as initially thought. The Air Transport Command finally had to take over almost all support over the "hump", reducing transport available to Chinese forces and Mountbatten's forces. As Gen Arnold told Congress:

The crews of a heavy bombardment group [XXth BC] in China must ferry over their own gasoline, bombs, replacement parts and everything else in their own B-24s [C-87 is a converted B-24]. Before this bombardment group can go on one combat flight, it must make four trips over the Hump. To perform one extremely dangerous mission, those crews must make four separate flights over the most dangerous mountain terrain in the world. Until such time as we conquer the territory and build the road into China, and/or capture a seaport, we must follow this procedure whether it is for 40 aircraft or 4,000.⁶²

In the final analysis, logistics consumed more than 80% of the XXth BCs aircraft missions and energy.⁶³

As you can see, logistical and operational problems prevented MATTERHORN from achieving its stated military objective of "Early Sustained Bombing of Japan". Nine missions over seven months is not much of a sustained campaign. But MATTERHORN did succeed in bringing strategic bombing to the Pacific, even if only on a limited scale, six months early. It also succeeded in allowing the US to vent its

⁶¹ Craven, pp 130-33, 164, 170.

⁶² Marshall, George C. (Gen), *The War Reports of General George C. Marshall*, (J.B. Lippincott Co, New York, 1947) pg 338. This quote is from Gen Arnold's report to Congress in late '44.

⁶³ Skates, pg 64.

frustration and strike directly at Japan on a "regular" basis. The news of the first B-29 strike against Japan on 15 Jun. '44 was met with great enthusiasm in America, making headline news even during Overlord. Congress even stopped its proceedings to celebrate the event (the time of the attack was specifically planned for celebrations in the US).⁶⁴

Assessing the impact of the B-29 on Chinese will and morale is a little more difficult. But the Chinese were extremely proud of the B-29 operations and many feel they had a great impact on the Chinese morale. In addition, all the transport aircraft available increased "hump" tonnage destined to the Chinese from a little more than 2,000 tons/month to over 70,000 by the end of the war -- the one thing Chiang Kai-Shek really wanted. Another valuable side effect of MATTERHORN was that it provided a shakedown period for the B-29 and the XXth Air Force command and control structure.⁶⁵ Numerous improvements were made that greatly increased operating efficiencies out of the Marianas.⁶⁶

----- *Lessons* -----

From the discussion on the lack of unity of command in the Pacific, it is readily apparent that this critical principle of war must be adhered to. Military strategists from Clausewitz to Jomini all agree on the importance of unity of command. Not only does unity of command ensure more effective and efficient use of available combat power, but it also better "arms" the theater to deal with outside military and political pressures. As "military statesmen", theater CINCs must fully appreciate all the goals and objectives of the National Command Authority (NCA) when developing campaign

⁶⁴ Craven, pp 102-3.

⁶⁵ The XXth BC was under XXth Air Force which was commanded by Gen Arnold and the JCS. Gen Arnold did this to avoid command and control problems that operating across several "theaters" would create. He also wanted to ensure the B-29s were not pulled into tactical support of the four area commanders.

⁶⁶ Craven, pp 171-5.

plans. We simply cannot afford to focus strictly on the war at hand or only on military actions. Military officers must increasingly become "military statesmen" if we are to provide the best service to our country.

The problems of strategy in the Pacific also serve to remind us of the need for effective communications between the NCA and theater CINCs. Without effective communications, there is no way CINCs can fully comprehend national and military strategic objectives. It is these objectives that drive theater campaign planning. With the possible survival of the nation at stake, the last thing we need are leaders that are reluctant to engage in frank and open dialog with the NCA. Good communication is a two-way street.

With FDR's post-war vision of China, we are again reminded that the use of military force is politics through other means. The military is still essentially a pawn in a political chess game. It is critical we remember this, not because we can't control our destiny, but so we can control it. It is still the military commander who can best advise the NCA how he should conduct his theater campaign. A well informed unified commander can better provide and/or analyze courses of action to attain the national objectives. As I stated in the paper, had there been a Supreme Allied Commander Pacific, he very well could have (better have!) provided a better alternative to the JCS and FDR on how best to use the B-29, and at the same time, present a way to bolster Chinese morale and keep them in the war. In fact, a single commander may have been able to determine earlier on that China wasn't as important as initially thought. He may also have been able to demonstrate to FDR that China could not live up to his post war expectations -- a lesson only starting to be learned in late '43 and early '44.

The military seems to continually have to relearn the importance of logistics. Operational commanders and planners simply must "get into bed" with the logistics staff from the outset of any campaign planning. This will minimize the odds of

forwarding a logistically implausible course of action. Another aspect of this though is that we very often underestimate just what we can do logistically. There is a tendency that if it seems too difficult, to just say no, it can't be done. The logistics of MATTERHORN were actually made to work -- but only because of the hard work and ingenuity of some very talented people. So the commander and planners need to continue to push logisticians to new limits, while working closely with them so as to understand logistical limitations!

The final lesson I'd like to offer is for historians, or anyone trying to learn something from past events. First and foremost, it is critical to try and view events through the eyes of those you study -- put yourself in their shoes and in their time. If this isn't done, the wrong lessons will be learned. In addition, look at the big picture, not at stated goals and objectives. Often these are not the true aims, especially if politics is involved. MATTERHORN is a perfect example. Almost all historians analyzing MATTERHORN did so only in an operational military context using the stated goal -- the sustained bombing of Japan. This paper has shown that the primary reason we did MATTERHORN was to bolster China and keep her in the war. The real goal then is a strategic and political objective. Viewed in this manner, MATTERHORN was effective -- albeit, not efficient -- because China was kept in the war and was available for use against Japan.

An "modern day" example of this last point may help; I'll use Desert Storm and the Scud problem. At the time of Desert Storm, all leaders were in agreement about the absolute importance of keeping Israel out of the war (versus keeping China in for MATTERHORN). Saddam Hussein correctly saw Israel as a strategic center of gravity for the Allied coalition. So, the coalition did everything conceivable to keep Israel out, and they were done for both military and political reasons. Even so, there are already some who are questioning why we did some of the military operations we did because

they are viewed as ineffective and inefficient use of available combat power (numerous A-10 and F-15E 'Scud caps' for example). But the point is that at the time, President Bush rode Gen Schwarzkopf and Gen Horner hard to do something about the Scud problem -- no cost seemed too high to keep Israel out of the war. The 'Scud caps' were conducted almost exclusively for strategic purposes. Perhaps this is similar to the way leaders viewed -- and reacted to -- the importance of keeping China in the war in the early days of WWII. We could only know this by trying to see things as they perceived them at the time.

----- Conclusion -----

The synergistic effects of the strategic situation in the Pacific, AAF insistence on following strategic bombing doctrine, and FDR's strategic vision were instrumental in the decision to go ahead with MATTERHORN. The strategic situation in the Pacific prior to MATTERHORN made it almost impossible for leaders to envision a better alternative. So, as a result, the "opening round" in the strategic bombing war over Japan came from China not because it was the best military solution, but rather because of political "necessity" that fit AAF doctrine like a glove. However, even though MATTERHORN was a logistics and operations nightmare, it did serve to satisfy the "intangible" needs of the AAF, the President, and the nation. In addition, it battle tested the B-29 and the new XXth AF command and control structure before intensive operations really got under way from the Marianas.

The United States Strategic Bombing Survey classified the operation as a "failure that diverted much needed material that could have been used better elsewhere."⁶⁷ No one has shown any enthusiasm for MATTERHORN in post-war assessments. However, viewed in strategic and political terms, MATTERHORN satisfied Chiang Kai-Shek and China remained in the war -- exactly what FDR wanted.

⁶⁷ The USSBS Summary Report (Air University Press, Maxwell AFB AL, 1987) pg 112.

I'll end with some questions as food for thought: would MATTERHORN have turned out differently had the strategic importance of China not declined as a result of the rapid acceleration of the Central Pacific thrust and resulting early availability of the Marianas?⁶⁸ Or, would it have been more effective for sustained bombing of Japan had Japan not overrun 14th Air Force bases in East China as MATTERHORN got underway?⁶⁹ And finally, would it have been more successful if Burma ground offensives that were planned as a way of opening land routes to China been successfully conducted?⁷⁰

⁶⁸ Remember, MATTERHORN was planned to be in operation for over a year before the Marianas would be available. When the landings were moved up a full year, BGen Hansell canceled deployment of the second B-29 wing (73rd) to China and ordered them to the Marianas. Once operations began out of the Marianas, most MATTERHORN missions were diverted to tactical support of the POA (PAC-AID).

⁶⁹ Original plans also called for refueling the B-29s at the forward bases enroute to or on the way back from Japan. This would have extended the B-29 range much further into Japan.

⁷⁰ At the time MATTERHORN was being planned, CCS plans called for various attacks to open a land route, so planners saw air resupply as a temporary measure. These were cancelled after MATTERHORN was approved.

KEY COMBINED CHIEFS OF STAFF CONFERENCES

DEC. 41 -- ARCADIA

- FDR and Churchill discuss air operations from China against Japan
- Churchill learns American fixation with China
- FDR insists a China theater be established and Chiang be informed of plans

Jan. 43 -- CASABLANCA

- All agreed it was critical to keep China in the war
- Agreed to increase "hump" tonnage.
- Pres Roosevelt first suggests B-29s in China
- Adm King presents outline long range plan to defeat Japan -- blockade and bombing, assault Japan if needed

MAY 43 -- TRIDENT (Washington DC)

- Top priority in transportation given to increasing "hump" tonnage to 10,000 tons per month
- Agree to concentrate on China with a plan to capture Hong Kong and occupation of eastern China to cut Japanese LOCs and for use to bomb Japan
- FDR stresses desire to hit Japan from China and reminds all that China is in danger of collapse

AUG. 43 -- QUADRANT (Quebec)

- MATTERHORN plan first presented, rejected in present form and sent to staffs for study
- Concept in principle was agreed to and all agreed to expedite movement of B-29s to China

NOV.-DEC. 43 -- SEXTANT (CAIRO)

- Roosevelt determined to make conference a success for China - resulted in recognition of China (Chiang Kai-Shek) as major allied power
- MATTERHORN approved -- 2 B-29 Wings of the XXth Bomber Command under direct control of the JCS
 - MATTERHORN not to impact other theater operations
 - B-29s to be main effort in theater
- Hump tonnage to 20,000 tons per month
- As Gen Arnold said in *Global Mission* (pg 476): "As far as the Army Air Force was concerned, the thing we wanted most of all had been gained...We received confirmation of our present plans...for bringing the B-29s into action against Japan as soon as we could get them there."
- FDR discusses "Four Policemen" concept with Stalin

MAR. 44 -- OCTAGON

- Critical decision made to bypass Truk to the Marianas by Jun. 44
- MacArthur to go for Luzon instead of Formosa -- won't need lodgement on east coast of China
- Only send one wing of B-29s to China, other will go to Marianas
- AAF satisfied political purposes of B-29 in China would be served, also would shake out the new airplane

Note: Primary sources for above information were Arnold (pp 443,476), Craven (pp 13-18,31), Hayes (pp 40-50,299,387,470-1), Marshall (pg 210), and Tuchman (pg 400).

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